United Nations ST/AI/2018/1

Secretariat

1 January 2018

Administrative instruction

Education grant and related benefits

The Under-Secretary-General for Management, pursuant to section 4.2 of Secretary-General's bulletin ST/SGB/2009/4, and for the purpose of implementing staff regulation 3.2 and staff rule 3.9 (see ST/SGB/2018/1), promulgates the following:

Section 1
Purpose

The purpose of the education grant and related benefits is to provide eligible staff members serving outside their home country in accordance with staff regulation 3.2 and staff rule 3.9 (a) (iii) with financial support to cover part of the cost of educating a child in full-time attendance at an educational institution.

Section 2
Eligibility

2.1 The eligibility requirements described in the present section apply to the education grant and related benefits, which consist of the reimbursement of capital assessment fees and a lump sum for boarding assistance.

Education grant and reimbursement of capital assessment fees

2.2 A staff member is eligible to receive the education grant and be reimbursed for capital assessment fees when the staff member meets all of the following conditions:

(a) Is an international recruit under staff rule 4.5;

(b) Holds a fixed-term, continuing or permanent appointment;

(c) Serves outside the recognized home country in accordance with staff regulation 3.2 and staff rule 3.9;[1]

[1] In accordance with section 5.5 of the administrative instruction on the visa status of non-United States staff members serving in the United States, members of their household and their household employees, and staff members seeking or holding permanent resident status in the United States (ST/AI/2000/19), non-United States staff members who sign the waiver in order to acquire permanent resident status in the United States will lose any entitlements they would otherwise have had to international benefits under the Staff Rules by virtue of serving at a duty station outside the country of their nationality (i.e., home leave, education grant, repatriation grant), but only from the date on which they are granted permanent resident status as shown on their alien registration card and not from the date on which they sign the waiver.

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(d) Has a child in full-time attendance at an educational institution at the primary level or above.

2.3 Education is deemed "primary" for the purposes of the present instruction when the child is 5 years of age or older at the beginning of the academic year, or when the child reaches the age of 5 within three months of the beginning of the school year. In exceptional circumstances, a lower minimum age of eligibility to receive the education grant may be accepted if the child is required by law to commence formal primary education at an earlier age.

2.4 Capital assessment fees are mandatory non-refundable fees levied by educational institutions to fund the construction, upgrade, refurbishment and maintenance of buildings. Such fees, which may also be known as building levies, funds or fees, capital levies, funds or fees, first-time parent fees, incorporation fees or development fees, may be levied: (a) as a one-time payment for a first-time enrolling child; (b) every year; or (c) as needed.

Boarding assistance

2.5 A staff member is eligible to receive boarding assistance, including in relation to a child attending a school that charges no fees or a nominal fee, when all of the following conditions are met:

(a) The requirements of section 2.2 are met;

(b) The staff member serves at a duty station with a hardship classification of A to E;

(c) The child attends an educational institution at the primary or secondary level;

(d) The educational institution in which the child is being educated is located outside the country of the duty station and beyond commuting distance from the area where the staff member is serving, notwithstanding national boundaries;

(e) The child does not live with the other parent.

2.6 A staff member may, in exceptional circumstances, receive boarding assistance with respect to a child who attends an educational institution at the primary or secondary level located within the country of the duty station but beyond commuting distance from the area where the staff member is serving and where, in the opinion of the Secretary-General, no educational institution within commuting distance from the area where the staff member is serving would be suitable for the child.

2.7 In order to avoid disrupting the continuity of the education of a child who is boarding to attend school at the primary or secondary level, a staff member is eligible for boarding assistance if one of the following conditions is met:

(a) The staff member is serving in a category H duty station[2] and is in receipt of boarding assistance for the academic year in progress on 1 January 2017 and the child remains at the same school beyond that date;

(b) The staff member is assigned, reassigned or transferred from a duty station with a hardship classification of A to E to a headquarters duty station during the school year in progress on 1 January 2018, and the child remains at the same school.

[2] All duty stations are placed by the International Civil Service Commission into one of six categories: H and A to E. Duty stations in category H are headquarters and similarly designated locations where the United Nations has no development or humanitarian assistance programme, or locations in countries that are members of the European Union. The A to E categories comprise all other duty stations, classified by order of difficulty of conditions of life and work.

2.8 The measures provided for in section 2.6 shall cease to apply when the child changes school.

Exclusions and cessation of the entitlement

2.9 Family members are not authorized to reside with a staff member assigned to non-family duty stations. Consequently, a staff member shall not be eligible for an education grant and related benefits in respect of a child attending an educational institution at a non-family duty station.

2.10 A staff member ceases to be eligible for an education grant and related benefits when the child in respect of whom the entitlement is received meets one of the following conditions:

(a) The child ceases to be in full-time attendance at an educational institution;

(b) The child completes four years of post-secondary studies or is awarded a first recognized post-secondary degree, whichever comes first. The four years of post-secondary studies are counted cumulatively from the first year of studies following the high school diploma even if part of the post-secondary studies is completed prior to the staff member's service with the Organization;

(c) The child reaches the age of 25, in which case the entitlement shall cease at the end of the academic year in which the child turns 25.

2.11 In the event that the child's education is interrupted for a period of at least one academic year by compulsory national service, illness or any other compelling reason, the period of eligibility may be extended for the period of interruption beyond the academic year in which the child reaches the age of 25.

Section 3
Admissible and non-admissible educational expenses

Admissible expenses

3.1 The education grant is computed on the basis of the following admissible expenses:

(a) Mandatory enrolment-related fees, which are required for the enrolment of a child in an educational institution. Such fees include but are not limited to admission, application, registration, enrolment, matriculation, orientation and assessment or examination fees;

(b) Tuition for full-time attendance that is paid directly to the educational institution and certified by the educational institution as being necessary for attendance;

(c) Tuition in the mother tongue of the staff member if all of the conditions below are met:

(i) Instruction is given by a qualified teacher certified in the language of instruction who is not a member of the staff member's family;

(ii) The staff member serves in a country whose language is different from the staff member's mother tongue;

(iii) The child attends a local educational institution in which the instruction is given in a different language from the staff member's mother tongue;

If both parents are United Nations staff members, tuition can be in either or all of the mother tongues as defined by the staff members upon initial appointment or based on their recognized nationality in the case of multiple mother tongues;

(d) Expenses for distance learning, including blended learning, when prior written approval is obtained and such courses meet one of the following conditions:

(i) They are the only available substitute for full-time attendance at an educational institution of a type not available at the duty station;

(ii) They are related to academic subjects that are not included in the regular curriculum but are required for the child's subsequent education;

(e) Following certification by the school, expenses for private tuition provided by a teacher who is qualified in the subject concerned and is not a member of the staff member's family when one of the following conditions is met:

(i) A child attends a local educational institution, and tuition in the language of the duty station is a precondition for admittance;

(ii) A supplement to correspondence courses for which expenses are admissible under section 3.1 (d) above is required;

(iii) A supplement to the regular programme is required for special coaching in an academic subject taught by the educational institution to make up for deficiencies attributable to the child's change of schooling as a result of expatriation or a change of the staff member's official duty station, or for special coaching in an academic subject not included in the educational institution curriculum but required for the child's subsequent education;

(f) Enrolment and tuition expenses for an apprenticeship or other similar arrangement when the educational institution certifies that any work placement is an integral part of the full-time curriculum and on the condition that the child receives no salary or remuneration for services rendered;

(g) Enrolment and tuition expenses for summer courses when the educational institution certifies that such courses are a prerequisite for further attendance during the subsequent regular academic year and for the institution's regular diploma. When admissible, expenses for summer courses are reimbursed as part of the admissible expenses incurred for the prior academic year, subject to the maximum claim amount.

Non-admissible expenses

3.2 All other educational expenses that are not listed in section 3.1 above shall be deemed non-admissible.

Reimbursement rates and amounts

3.3 Admissible expenses listed in section 3.1 above shall be reimbursed according to the global sliding scale below, regardless of the currency and the country in which the expenses are incurred.

Global sliding scale

Admissible expenses (United States dollars)	*Maximum amount for calculation (United States dollars)*	*Reimbursement rate (percentage)*	*Maximum reimbursement amount (United States dollars)*
0–11 600	11 600	86	9 976
11 601–17 400	5 800	81	4 698
17 401–23 200	5 800	76	4 408

Admissible expenses (United States dollars)	*Maximum amount for calculation (United States dollars)*	*Reimbursement rate (percentage)*	*Maximum reimbursement amount (United States dollars)*
23 201–29 000	5 800	71	4 118
29 001–34, 800	5 800	66	3 828
34 801–40 600	5 800	61	3 538
40 601 and above	–	–	–

3.4 Eligible staff members are entitled to a maximum amount of education grant of $30,566 per child, per academic year, regardless of the number of claims submitted.[3]

Scholarships, bursaries or similar grants

3.5 All scholarships, bursaries or similar grants received by or for the child shall be deducted first from those expenses that are not admissible under section 3.2, and the balance, if any, from the admissible educational expenses under section 3.1 before the amount of the grant is computed. Any remaining balance will be deducted from the education grant and related benefits. A staff member shall bear at least 14 per cent of the cost of admissible expenses.

3.6 Financial assistance in the form of loans to assist in the payment of educational expenses, which must be reimbursed by the staff member or the child to a financial institution, is not considered to be a scholarship, bursary or similar grant.

Section 4
Boarding assistance

4.1 Eligible staff members shall receive boarding assistance in the form of a lump-sum payment of $5,000 per child, per academic year, regardless of the amount of actual boarding-related expenses incurred. The lump sum shall be paid in addition to any reimbursement computed under section 3.3 above.

Section 5
Reimbursement of capital assessment fees

5.1 Capital assessment fees shall be reimbursed at 100 per cent in addition to the education grant upon certification from the educational institution that all of the following conditions are met:

(a) The purpose of the fees is consistent with the description provided in section 2.4 above;

(b) The child's enrolment or continued enrolment is conditional upon the payment of the fees.

Section 6
Prorating of amount of the education grant and related benefits

6.1 The amount payable to a staff member for the education grant, the reimbursement of capital assessment fees and boarding assistance shall be prorated

[3] This applies to a staff member who is separated and reappointed by an organization of the United Nations common system and as a result submits multiple claims within the same academic year.

according to any of the following conditions, which are not mutually exclusive and may be combined:

(a) Where the period of attendance or boarding at an educational institution covers less than two thirds of the academic year, the amount of the grant and related benefits shall be prorated on the basis of the period of attendance or boarding, as applicable, compared to the full academic year.[4] In the case of post-secondary studies where attendance is determined by semester, any educational expenses corresponding to the semester in which a child is not in full-time attendance shall be considered non-admissible and shall not be included in the computation of the education grant;

(b) Where a staff member who is eligible for the grant and related benefits at the beginning of the academic year separates from service and the period of eligible service covers less than two thirds of the academic year, the amount of the grant and related benefits shall be prorated on the basis of the period of eligible service compared to the full academic year;

(c) Where a staff member's service with the Organization or eligibility for the education grant and related benefits commences after the beginning of the academic year, the amount of the grant and related benefits shall be prorated on the basis of the period of eligible service compared to the full academic year. No expenses relating to the period of educational institution attendance prior to the date of appointment of a staff member, or date of eligibility for education grant, shall be reimbursed;

(d) Where a staff member is on special leave without pay, the amount of the grant and related benefits shall be prorated on the basis of the period of eligible service compared to the full academic year;

(e) Where a staff member works on a part-time basis, the amount of the grant and related benefits shall be prorated on the basis of the eligible service compared to the full academic year.

6.2 Notwithstanding the provisions of section 6.1, the amount payable for the reimbursement of non-refundable capital assessment fees shall not be prorated, regardless of the duration of the attendance, when a staff member changes duty station during the academic year and the child has to change educational institutions as a result of the staff member's change of duty station. In the event that the staff member is required to pay a capital assessment fee to the new educational institution, no prorating shall apply.

6.3 When prorating is required, the amounts shall be computed on the basis of calendar days and expressed as a percentage of the number of calendar days of attendance or eligible service over the total number of calendar days of the educational institution's academic year. When the educational institution charges fees at different rates for various parts of the year, this shall be reflected in prorating the amount payable.

6.4 In accordance with staff rule 3.9 (f), when a staff member dies while in service at or after the beginning of the academic year, the education grant and related benefits shall be paid in full for that academic year.

6.5 In accordance with section 11.2 of the administrative instruction on unsatisfactory conduct, investigations and the disciplinary process (ST/AI/2017/1), a decision to place a staff member on administrative leave without pay shall be without

[4] Full-time attendance is determined by the certification provided by the school. When the child is in full-time attendance for two thirds or more of the academic year, the child is considered to have been in full-time attendance for the full year and no prorating applies.

prejudice to the continuation of any education grant to which the staff member may be entitled.

Section 7
Request for advances

7.1 An eligible staff member who is required to pay all or a portion of the full-time educational institution attendance expenses at the beginning of the academic year may request an advance against the entitlement, including capital assessment fees and boarding assistance.

7.2 Any paid advance shall be considered as due from the staff member until the claim for payment of the education grant and related benefits has been received and processed or until the advance is recovered from the staff member. Staff members are required to submit their claims for payment promptly, as required by section 8 of the present instruction. Recovery from the staff member's emoluments shall take place after the third month of the end of the academic year or upon separation from service, whichever comes first.

7.3 A staff member shall not be entitled to the payment of any education grant and related benefits under the present instruction or under that on the special education grant until any and all outstanding advances against the education grant and related benefits have been settled, by receipt and processing of the relevant claims by the Organization and/or by recovery of any and all outstanding balances.

Section 8
Claims for payment of the education grant and related benefits

8.1 A staff member shall submit a claim for payment of the education grant and related benefits as follows:

(a) Within two months upon completion of the academic year;

(b) Upon cessation of the child's attendance;

(c) Before the date of separation.

8.2 Claims for payment of the education grant and related benefits shall be submitted in accordance with the procedures set out in information circular ST/IC/2018/7.

Section 9
Education grant travel

9.1 Under staff rule 3.9 (g), a staff member who is eligible for boarding assistance shall be entitled to travel expenses for the child for one round trip each academic year between the primary or secondary educational institution and the staff member's duty station, subject to all of the following conditions:

(a) The child's attendance at the educational institution is at least two thirds of the academic year;

(b) The travel is undertaken during the academic year or within three months of the beginning or end of the academic year;

(c) The child spends at least seven days at the staff member's duty station.

9.2 In the event that the staff member dies while in service at or after the beginning of the academic year, the entitlement to education grant travel shall continue until the end of the academic year and may be authorized for travel between the educational institution and the duty station, or another location, subject to the maximum allowed under section 9.3 below.

9.3 Education grant travel expenses are covered up to the cost of travel between the staff member's home country and the staff member's duty station.

9.4 Where the staff member is serving at a non-family duty station or in cases where the child cannot travel to the staff member's duty station, the staff member or the staff member's spouse may be authorized to travel in lieu of the child, provided that the staff member or the spouse spends a minimum of seven days at the location of the child's educational institution.

9.5 When the staff member or the spouse travels in lieu of the child, all of the following conditions shall apply:

(a) The travel expenses borne by the Organization shall not exceed the amount that would have been paid for the child or children;

(b) No travel time shall be granted and all working days away from the office shall be charged to annual leave;

(c) For administrative purposes, such travel shall be charged as education grant travel.

9.6 When the staff member or the spouse travels in lieu of the child, other children for whom an education grant travel entitlement exists may travel between the location of their educational institution and the location to be visited by the parent, provided that the expenses borne by the Organization do not exceed the maximum that would otherwise have been applicable.

9.7 When a child attends two educational institutions during a single academic year, one at the duty station and the other away from the duty station, education grant travel may be authorized if the child's attendance at the educational institution away from the duty station is for a period of at least one term or semester.

Section 10
Supporting documentation

10.1 A staff member is required to provide supporting documentation for all requests for an advance or claims for payment of the education grant and related benefits. The staff member is responsible for the completeness and accuracy of the documentation submitted. Documentation provided by an educational institution may not be altered in any way.

10.2 A staff member shall retain, for a period of five years from the date of submission of the claim for payment, all relevant documentation, such as documentation provided by the educational institution, medical records, outcomes of applications for benefits provided by States, local governments and medical insurance, invoices, receipts, cancelled cheques and bank statements documenting expenditure.

10.3 When submitting a request for an advance or a claim for payment, staff members attest to:

(a) The correctness of the information provided;

(b) Their understanding of the obligation to retain the documentation for the period specified under section 10.2 and to submit it upon request for monitoring and compliance purposes;

(c) Their understanding of the obligation to inform the Organization of any changes in the information or estimates provided in support of the request;

(d) Their understanding that the Organization may conduct a compliance review of the request or claim;

(e) Their understanding of the consequences of submitting incomplete, unsubstantiated or false information as discussed in section 10.4 below.

10.4 A staff member may be required to provide supporting documentation in its original form or scanned copies that are certified as having been seen by a United Nations official. Providing incorrect information or failing to provide the requested information within the applicable time frame or to report changes or alterations to the documentation provided by the educational institution may result in one or more of the following:

(a) Rejection of the claim;

(b) Recovery of prior payments for education grant and related benefits;

(c) Any other administrative and/or disciplinary measures in accordance with staff rule 10.2, including dismissal for misconduct.

Section 11
Final provisions

11.1 The present instruction shall govern the administration of the education grant and related benefits as of the academic year in progress on 1 January 2018.

11.2 Administrative instructions ST/AI/2011/4 of 27 May 2011, ST/AI/2011/4/Amend.1 of 30 December 2011 and ST/AI/2011/4/Amend.2 of 31 March 2014 are hereby abolished.

(*Signed*) Jan **Beagle**
Under-Secretary-General for Management